

1. Client Maintenance

1.1. Client Search

The system should provide an entry point to a client record through a search function. The client search form should include the following fields: CA ID, Last Name, First Name, Middle Initial, DOB, and SSN. The user will key in any combination of fields. The search button will be enabled with any keyed input. The exit button is always enabled. On click of the search button, the system will check the CMC database using the keyed fields. When there is any kind of match, the following buttons will be enabled: notes, CMC search, client maintenance, new client, program summary, menu, and exit.

If CMC record is not returned, the *client search result form (CMC)* will display the message "Sorry, no client match." The "new client" button will be enabled. On click of the "new client" button, the *client maintenance form* will open. The "CA Search" button will also be enabled. On click on the "CA Search" button, the system will search the CA SQL database for any matches of the keyed fields. The *client search result form (CA)* will display any matches or "sorry, no client match."

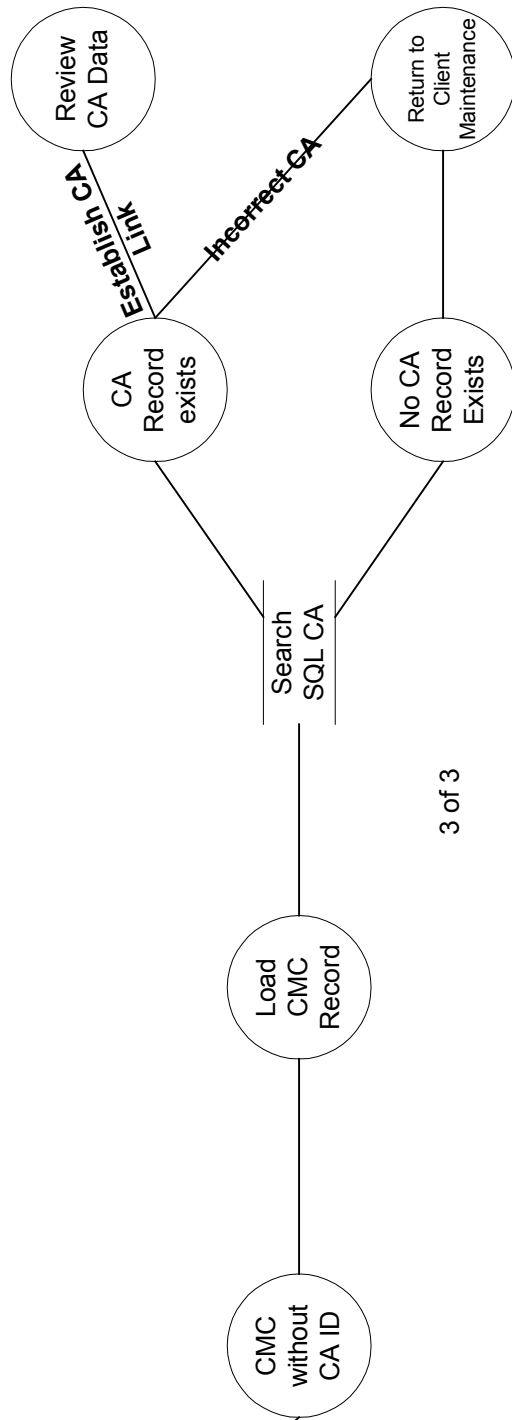
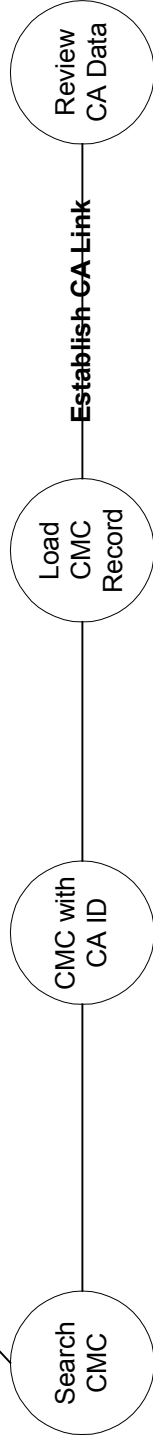
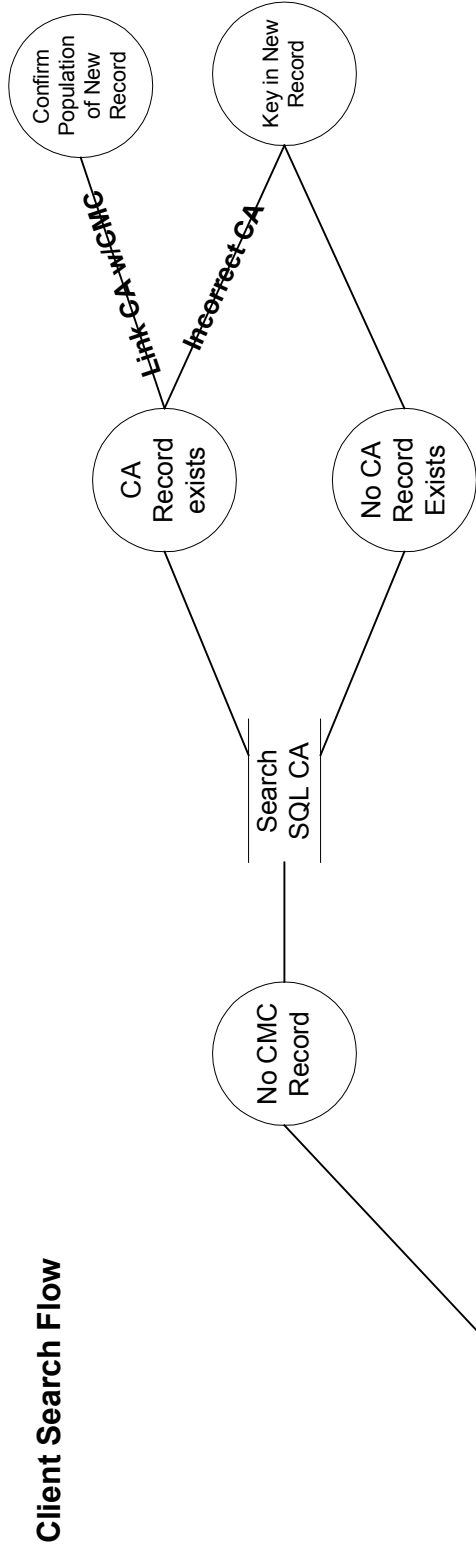
If there is no CMC record and there is a CA match, the *client search results form (CA)* will display CA ID, last name, first name, middle Initial, DOB, and SSN. The "new client" button and "link CA" button will be enabled. On click of the "new client" button, a blank *client maintenance form* will open. On click of the "link CA" button, the *client maintenance form* will open with the CA ID populated. The "review CA button" on the maintenance form will be enabled and on click a CA pop-up window will display the following CA data: address, zip, phone, DOB, SSN, ethnicity, and language, last assmt date and type, decision maker, emergency contact and contact phone. The user will check the appropriate fields to update and the "copy CA data" and "exit" button will be enabled. On click of the "copy CA data" button, the checked fields will populate the CMC fields on the *client maintenance form*.

If CMC does not match and No CA returned, the *client search result form (CA)* will display "sorry, no client match." The "new client" button will be enabled. On click of the "new client" button, the *client maintenance form* will open with the tab stop at the top of the form (client last name).

If there is a CMC record with the CA ID returned on search of the CMC database, the *client search result form* will display CA ID, last name, first name, Middle Initial, DOB, and SSN. The "client maintenance" button will be enabled and on click, the CMC record is loaded into the *client maintenance form*. The system established a link with the CA using the CA ID. The "review CA" button is enabled and on click a CA pop-up window will display the following CA data: address, zip, phone, DOB, SSN, ethnicity, and language, last assessment date and type, decision maker, emergency contact and contact phone. The user will check the appropriate fields to update and the "copy CA data" and "exit" button will be enabled. On click of the "copy CA data" button, the marked fields will overwrite or populate the CMC fields on the *client maintenance form*.

If CMC matches and no CA ID, the *client search result form* will display last name, first name, Middle Initial, DOB, and SSN. The “client maintenance” button will be enabled and on click, the CMC record is loaded into the *client maintenance form*. If the CA ID is blank, the “CA search” button will be enabled. If no CA matches, the *client search result form (CA)* will display the message “sorry no client match.” The “client maintenance” button will be enabled. If the CA matches, the *client search results form (CA)* will display CA ID, last name, first name, Middle Initial, DOB, and SSN. The “link CA” button will be enabled. On click of the “link CA” button, the *client maintenance form* will open with the CA ID populated. The “review CA button” will be enabled and on click a CA pop-up window will display the following CA data: address, zip, phone, DOB, SSN, ethnicity, and language, last assessment date and type, decision maker, emergency contact and contact phone. The user will check the appropriate fields to update and the “copy CA data” and “exit” button will be enabled. On click of the “copy CA data” button, the marked fields will overwrite or populate the CMC fields on the *client maintenance form*.

Client Search Flow



1.2. Client record modification

Clerical staff will perform most of the client record modifications usually at time of intake and on monthly basis using information from the (ICL) report. The clerical staff will key in modifications using *the client maintenance form*. Data maintained about the client should include: last name, first name, middle initial, dob, ssn, street, city, zip, phone, program type, begin date, end date, referral source, office, staff code, intake date, TGCM (yes/no), case manager, last assessment date, assmt type, language, ethnicity, gender, emergency contact, emergency contact phone, service plan mail date, service plan return date, consent date, decision maker, live alone, and case status (pending, never opened, open).

Client Maintenance		Maggie Jones 12/7/1954 (48), 555-11-11111 CA ID: 123456 CM: Andrea Yip Office: Seattle					
Program Summary		Amy Wong	Individual Providers	Diabetes Registry	Notes		
CA ID: _____ Last Name: _____ First Name: _____ Middle Initial: _____ DOB: _____ (age) Gender: _____ SSN: _____ Ethnicity: _____ Language: _____							
Street: _____ Phone: _____		Zipcode: _____		Live Alone? <input type="checkbox"/>			
Intake Date: _____		Intake Staff: _____		Referral Source: _____			
Case Manager: _____		Office: _____		Referral Date: _____			
Termination Date: _____		Termination Reason: _____		Case Status: _____			
Primary Program: _____		Program Begin Date: _____		Program End Date: _____			
Last Assmt Date: _____		Last Assmt Type: _____		TGCM: <input type="checkbox"/> More program detail...			
Secondary Program: _____		Program Begin Date: _____		Program End Date: _____			
Last Assmt Date: _____		Last Assmt Type: _____		More program detail....			
Decision Maker: _____		D.M. phone: _____					
Consent Date: _____		Svc. plan maildate: _____		Svc. plan return date: _____			
Emergency Contact: _____		Emergency Phone: _____					
Assign Super.	Save	Client Search	Review CA	Add New	Print Face Sheet	Reports	Menu

1.2.1. Intake modification

Data maintained for intake purposes should include: last name, first name, middle initial, ssn, dob, primary program type (from a pick list), begin date, referral source (from a pick list), office (from pick list), staff code (automatic based on login), intake date (default to today's date with date picker), TGCM (yes/no), live alone (yes/no) and case manager (from pick list). On click of the supervisor assign button, the system checks the office, zip, and program type. If less than three are filled in, the system highlights in red the missing

data field text and displays the message “Office, Program and Zip code required to assign a supervisor.”

1.3. Create new client record

If a search result returns no client match, the “new client” button will be enabled on the *search result form*. On click of the “new client” button, the *client maintenance form* will open with the tab stop at the top of the form (client last name).

The system will do a second check after the following information is entered and saved: DOB, SSN, last and first name. If the search results in a match, a message box will display “this client may already exists, do you still want to continue?” If yes, save the record. If no, return the search results on the *client search result form*.

1.4. Terminate client record

ADS clerical staff will terminate a client record on the *client maintenance form* when the client has died, moved out of the ADS network, or transferred out of the ADS network.

2. Note Maintenance

The notes button will be accessible from the *client maintenance form*, the *client search result form* (after a successful search), and all program screens. Upon click of the notes button, the Note Maintenance form will open. The following buttons will be active (modify, add new, delete, Import CA SER, print, and exit.)

ADS staff will view, modify, and add notes to the Note Maintenance Form. In the CA, these notes are called Service Episode Records (table: Session). The data maintained about notes include: note date, note text, type of contact (home visit, telephone, office interview, collateral contact, case staffing, other).

2.1. CA SER Notes

Upon click of the “Import CA SER” button, the SER notes from the CA system will import into CMC. ADS staff can only view the CA SER notes.

3. Client Program Maintenance

3.1. Program Summary

ADS staff will be able to view current and historical program information on the *Program Summary Screen*. The “program summary” button will be accessible from the *client maintenance form*, the *client search result form* (after a successful search), and all program screens. The information on this screen is view only. The following data will be displayed: Original Intake date, Primary program type (COPES, MPCS, Chore, Discretionary CM, SHA), Begin date, last assessment date, authorized hours, next assessment date, all secondary programs client is currently on (AAEP, Diabetes, current Amy Wong authorizations), list of historical program name, begin and end dates, case manager, and authorized hours. The program name for both current and

historical will be linked to a program detail page. Upon click of the program name, the program detail page will open. The program detail page will be editable. Primary programs are Copes, Mpcs, Chore, Assistance, Discretionary CM. Secondary programs are AAEP, SHA, Section 8, APS, ICM, Diabetes registry, and Amy Wong. A client must have a primary program, but may have multiple secondary programs.

Program Summary		Maggie Jones		12/7/1954 (48)		555-11-11111	
		CA ID: 123456		CM: Andrea Yip		Office: Seattle	
Program Summary		Amy Wong		Individual Providers		Diabetes Registry	
						Notes	

Intake date: _____

Primary Program

Program Type: _____ Provider: _____

Begin Date: _____ Last Assmt Date: _____ Authorized Hours: _____

Next Assmt Due: _____

Secondary program: _____ Secondary program: _____

Historical Program(s):

1) Program Name	Begin Date	End Date	CM	Last Auth. Hours	Last Assmt. date	Provider
2) Program Name	Begin Date	End Date	CM	Last Auth. Hours	Last Assmt. date	Provider
3) Program Name	Begin Date	End Date	CM	Last Auth. Hours	Last Assmt. date	Provider

Save (n/a)	Client Search	Review CA (n/a)	Print Screen	Reports	Menu
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3.1 Core Program Detail

ADS staff will view and modify Core program detail using the *Core Program detail form*. Core programs include COPEs, MPCs, and Chore. The following date will be displayed and/or maintained on the *Core Program* form: intake date, program type, begin and end date, last assessment date(CA), next assessment due, authorized hours(CA), TGCM (yes/no), ETP end date, ETP amount, policy exception date, policy exception amount, and list of ancillary service. Staff will also maintain the contact schedule. For each contact, data maintained includes the date of contact, type of contact, and staff type who made the contact. For the first year of the client, there is a 30 day face-to-face contact and check box on whether a CA was completed, and three additional contacts of any type. The second year starts with the annual review and then three additional contacts of any type. For TGCM clients, there is a 30 day face-to-face contact, and three additional contacts in which one has to be a face-to-face. The second year starts with the annual review and then three additional contacts in which one has to be a face-to-face. Contact types include phone, in-home visit, collateral, case staffing. Contact staff types include Case Manager (CM), Nurse (RN), Social Service Aide (SSA), Alternative CM, and Supervisor.

Core Program Detail	Maggie Jones		12/7/1954 (48)		555-11-11111	
	CA ID: 123456		CM: Andrea Yip		Office: Seattle	
	Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ Program Type: _____ Begin Date: _____ End Date: _____ ETP end date: _____ Policy Exception date: _____ List of Ancillary Services: _____ Schedule of contacts: TGCM (additional face-to-face contact)						
Provider: _____ Last Assmt Date: _____ Next Assmt Due: _____ ETP amount: \$ _____ Exception amount \$ _____ 30 day: _____ CA?: <input type="checkbox"/> Type: _____ Staff: _____ 2 nd Contact: _____ Type: _____ Staff: _____						
Authorized Hours: _____ TGCM: <input type="checkbox"/> 1 st Contact: _____ Type: _____ Staff: _____ 3 rd Contact: _____ Type: _____ Staff: _____						
Save	Client Search	Review CA	Print Screen	Reports	Menu	

3.2 Discretionary CM Program Detail

ADS staff will view and modify Discretionary CM program detail using the *Discretionary CM program detail form*. Data displayed and maintained about a client's discretionary cm program include the following: original intake date, begin and end date, last assessment date (CA), level, service type, service outcome, initial phone contact date, 1st face-to-face date, 90 day review date, and annual review date.

Discretionary CM Program Detail	Maggie Jones		12/7/1954 (48)		555-11-11111	
	CA ID: 123456		CM: Andrea Yip		Office: Seattle	
	Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ Begin Date: _____ End Date: _____ Level: _____ Service Type: _____ Schedule of contacts:						
Last Assmt Date: _____ Service Outcome: _____ Initial phone: _____ 1 st face-to-face: _____						
90 day review: _____ Annual review: _____						
Save	Client Search	Review CA	Print Screen	Reports	Menu	

3.3 SHA Program Detail

ADS staff will view and modify SHA client program detail using *the SHA program detail form*. Data displayed and maintained will include the following: original intake date, begin and end date, last assessment date(CA), SHA status (active/inactive), SHA level (1=Assistance, 2=CM, 3=ICM), provider,

building name, building type, building contact, building contact phone, physician(CA), physician phone(CA), service type, service outcome, initial phone contact date, 1st face-to-face date, 90 day review, annual review.

SHA Program Detail		Maggie Jones		12/7/1954 (48)		555-11-11111	
		CA ID: 123456		CM: Andrea Yip		Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ SHA level : _____ Begin Date: _____ End Date: _____ Physician: _____ Service Type: _____ Schedule of contacts: SHA status: _____ Last Assmt Date: _____ Provider: _____ Physician phone: _____ Service Outcome: _____ Initial phone: _____ 1 st face-to-face: _____ Building Name: _____ Building Type: _____ Bldg contact: _____ Contact phone: _____ 90 day review: _____ Annual review: _____							
Save	Client Search	Review CA	Print Screen	Reports	Menu		

3.4 Section 8 Program Detail

ADS staff will view and modify Section 8 program detail on the *Section 8 program detail form*. Data displayed and maintained include the following: Original intake date, HOPE (yes/no), application date, start date, voucher date, lease date, bedroom request, withdraw date, voucher (yes/no).

Section 8 Program Detail		Maggie Jones		12/7/1954 (48)		555-11-11111	
		CA ID: 123456		CM: Andrea Yip		Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ HOPE <input type="checkbox"/> Application Date: _____ Withdraw Date: _____ Start Date: _____ Voucher Date: _____ Voucher <input type="checkbox"/> Lease Date: _____ Bedroom request: _____							
Save	Client Search	Review CA	Print Screen	Reports	Menu		

3.5 ICM Program Detail

ADS staff will view and modify ICM program detail on the *ICM program detail form*. Data displayed and maintained include the following: Original intake date, program begin and end date, initial contact date, contact activity, contact date, risk factors (Mental Health, Substance Abuse, Cognitive Impairment), problem focus, outcome, income level (SSI, 40% SMI, 80% SMI, not low income), and housing type (own home, rental, homeless, transitional).

<i>ICM Program Detail</i>		Maggie Jones CA ID: 123456		12/7/1954 (48) CM: Andrea Yip		555-11-11111 Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ Begin Date: _____ Income Level: _____ End Date: _____ Housing Type: _____ Risk Factors: _____ Initial Contact Date: _____ Contact Activity: _____ Problem Focus: _____ Contact Date: _____ Outcome: _____							
Save	Client Search	Review CA	Print Screen	Reports	Menu		

3.6 APS Referral Detail

ADS staff will view and modify APS referral information on *the APS referral detail form*. Data displayed and maintained include the following: Original intake date, APS referral date, referral source, referral type, report date, report date received, findings, and APS worker. The categories for referral types are self-neglect, neglect, mental abuse, physical abuse, sexual abuse, exploitation, and abandonment.

<i>APS Referral Detail</i>		Maggie Jones CA ID: 123456		12/7/1954 (48) CM: Andrea Yip		555-11-11111 Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____ APS referral date: _____ Report Date: _____ Referral Source: _____ Report Date Received: _____ Referral Type: _____ Findings: _____ APS worker: _____							
Save	Client Search	Review CA	Print Screen	Reports	Menu		

3.7 AAEP Program Detail

ADS, Senior Services, and King County Public Nurse will view and modify AAEP program information using the *AAEP program detail form*. This module needs to be accessible by staff outside of ADS. Data displayed and maintained include the following: Original intake date, AAEP status (open, closed, inactive) primary program, last assessment date, authorized hours, program begin and end date, referral source and date, service provision, service unit, service provider organization, service provider contact, service date, service outcome, diagnosis (CA), diagnosis status (managed or unmanaged), presenting problem, physician (CA), treatment, medications (CA), allergies (CA), medical equipment (CA), volunteer name, volunteer match date, and privacy flag. The categories for service provision are

assessment, consultation, health education, transportation, recreation, socialization, and nutrition. The system needs to maintain a history of service information.

AAEP Program Detail		Maggie Jones		12/7/1954 (48)		555-11-11111	
		CA ID: 123456		CM: Andrea Yip		Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____		AAEP status: _____					
Primary Program: _____		Last Assmt Date: _____		Authorized Hours: _____			
Begin Date: _____		Service Date: _____		Diagnosis 1: _____			
End Date: _____		Service Provision: _____		Diagnosis 2: _____			
Referral source: _____		Service Unit: _____		Diagnosis 3: _____			
Referral Date: _____		Service Provider: _____		Diagnosis status: _____			
Physician: _____		Provider Contact: _____		Medications: _____			
Presenting Problem: _____		Service Outcome: _____		Treatment: _____			
Volunteer Name: _____				Allergies: _____			
Match Date: _____				Medical Equipment: _____			
Privacy: <input type="checkbox"/>				1 st Contact: _____			
Schedule of contacts:		30 day: _____ CA?: <input type="checkbox"/>		Type: _____ Staff: _____			
		2 nd Contact: _____		3 rd Contact: _____			
		Type: _____ Staff: _____		Type: _____ Staff: _____			
Save	Client Search	Review CA	Print Screen	Reports	Menu		

3.8 Mental Health Program Detail

ADS staff will view and modify MH program data on the *Mental Health program detail form*. Data displayed and maintained include the following: MH referral date, service date, service hours, service type, service agency, evaluation date. The categories for service type are assessment, travel, consultation, and assessment follow-up. The agencies are Seattle Mental Health (SMH), GRATT, and Dr. Wills.

Mental Health Service Detail		Maggie Jones		12/7/1954 (48)		555-11-11111	
		CA ID: 123456		CM: Andrea Yip		Office: Seattle	
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry	Notes	
Intake date: _____		MH agency: _____					
MH referral date: _____		Evaluation date: _____					
Service date : _____							
Service hours: _____							
Service type: _____							
Save	Client Search	Review CA	Print Screen	Reports	Menu		

4 Nursing Services Program Detail

ADS Nurse staff will view and modify nursing services program detail on the *Nurse Services program form*. ADS case managers and supervisors will have view access for their caseload. Nurses will need to choose a client from a list or search for a client. Data displayed and maintained include the following: activity date, client last name, first name, clt core program, nurse, case manager name, nurse activity type, activity frequency, activity time, and in-service education to staff.

Nursing Services Program		Nurse Name Office: Seattle			
		Program Summary	Amy Wong	Individual Providers	Diabetes Registry
Client List Client Program: _____ Activity Date: _____ In-Service Education: (min) Case Manager: _____ Activity Type: (list) Activity Frequency: Activity Time: (minutes)					
Save	Client Search	Review CA	Print Screen	Reports	Menu

5 Diabetes Registry Program Detail

Currently, ADS support staff use an Access 97 database to enter and view information about the Diabetes Registry. ADS staff will view and modify registry information on the *Diabetes Registry form*. Data displayed and maintained include the following: Medicare (yes/no), last assessment date, insurance, file review date, consent sent date, client contact date, consent return date, consented (yes/no), Doctor name, Doctor phone, Doctor fax, Medical sent date, Doctor contact date, Medical receive date, height, weight, HCG_A1Cdate and HCG_A1Cvalue, diagnosis date, diabetes treatment plan (yes/no), smoke (yes/no), monitor glucose (yes/no), registry start date, registry end date, eye exam, foot exam, blood pressure date, blood pressure value, aspirin therapy (yes/no), microalbumin date, microalbumin value, nutrition referral date, nutrition service date, exercise assmt date, exercise outcomes, medical management service date.

6 Individual Provider (IP) Maintenance

Currently, ADS support staff use an Access 97 database to enter and view information about Individual Providers (IP). Any active IP should be migrated to CMC.

6.1 IP Search

The system should provide an entry point to an individual provider (IP) through a search function. The IP search form should include the following fields: IP number, IP last name, IP first name. The user will key in any combination of fields. The search button will be enabled with any keyed input. On click of the search button, the system will check the CMC database using

the keyed fields. If an IP record is not returned, the *IP search result form* will display the message “Sorry, no IP match.” The “add new IP” button and “search again” button will be enabled.

If an IP record is returned, the IP search result form will display the IP number, IP last and first name. The user may either hi-light the correct record and click “edit IP” or double click the correct record to open the *IP maintenance form*.

6.2 IP record modification

Data maintained about an IP can be categorized by demographics, training, and background. Data maintained about IP demographics include the following: IP number, last name, first name, middle, address, city, zip, phone, phone 2, ssn, language, birthdate, status, entry date (date of last save), referral office, intake date, program, initial date of service, termination date, contract end date, proof of work (yes/no), pictureID (yes/no), other ID (yes/no), client name (link to CMC client), case manager, and provider notes. An aide may work for more than one client. Data maintained about IP background include Watch sent date, RCS sent date, RCS return date, criminal history result, FBI check (yes/no), FBI sent date, FBI return date. Data maintained about IP Training include FCG date, 2000 CE date, 2001 CE date, 2002 CE date, FCG due date, next registration date, registration type.

7 Reporting

7.1 Generate face sheet report

7.2 Generate IP reports

Report Name	Description	Fields	Filter
Training Reports			
FCG 30 Day Tickler Query: (45FCGALL)	List of all Ips who have not taken the FCG and initial service date is greater than 30 days. Report should be run weekly to capture new Ips.	Office, CM, IP name, initial svc date, FCG due date, IP ID, language, registration date and type, clt	Office, CM, Initial date, IP name
FCG 30 Day Labels Qry: (45FCG2)	Report for printing 30 day tickler labels using either Maco ML-1400 or Avery #5162 labels.	IP name, IP address	IP name
FCG 75 Day Tickler Qry: (90FCGAll)	List of all Ips who have not taken the FCG and initial service date is greater than 75 days. Report should be run weekly.	Same as 30 day	Office, CM, Initial date, IP name
FCG 75 Day Labels Qry: (90FCG2)	Report for printing 75 day tickler labels.	IP name, address	IP name
FCG Past Due Qry: (120FCG)	List of all Ips who have not taken the FCG and initial service date has	Same as 30 day	Office, CM, Initial date,

Report Name	Description	Fields	Filter
	exceeded 120 days.		IP name
2000 CE Tickler Qry: (2000CE)	List of all Ips who have not taken a CE in 2000.	CM, CM2, office, IP name, IP ID, initial svc date, FCG taken, CE '99, registration date and type, lang, clt.	Office, CM, IP name
2000 CE Labels	Labels for 2000 CE report	IP name and address	Office, CM, IP name
2001 CE Tickler Qry: (2001CE)	List of all Ips who have not taken a CE in 2001.	CM, CM2, office, IP name, IP ID, initial svc date, FCG taken, CE '00, registration date and type, lang, clt.	Office, CM, IP name
2001 CE Labels	Labels for 2001 CE report	IP name and address	Office, CM, IP name
2002 CE Tickler Qry: (2002CE)	List of all Ips who have not taken a CE in 2002.	CM, CM2, office, IP name, IP ID, initial svc date, FCG taken, CE '01, registration date and type, lang, clt.	Office, CM, IP name
2002 CE Labels	Labels for 2002 CE report	IP name and address	Office, CM, IP name
Background Check & Contract Reports			
Expiring BC (Watch Expiration)	List of all Ips who's background check will be expiring after 2 years. If([WatchSentDate]+670)<=Now(),"y","n")	Office, Cm, watch sent date, IP ID, IP	Office, CM, Watch date
Expiring BC Labels	Labels for the Expiring BC report. Need check list in order to reprint as needed.	IP name and address	Office, CM, IP name
Pending BC	List of all Ips who's background check results are "pending".	Office, criminal history result, watch sent date, CM, IP	Office, Watch date, CM
FBI Tickler	List of Ips who have not had their FBI results returned.	Office, FBI sent date, IP, Clt, referral office, initial date of svc	Office, FBI sent date
Need FBI	List of Ips who need the FBI check	Office, initial date of svc, IP, Clt, referral office, FBI sent date, FBI return date	Office, IP
Expiring Contracts (contract expiring list)	List of all Ips who's contract will expire within a month.	Office, CM, IP, Contract end date,	Office, CM, Contract

Report Name	Description	Fields	Filter
	IIf([Contract_End]-31)<=Now(),"y","n")	ClT	end date, IP
Contract Labels	Labels for the Expiring Contract report. Need check list in order to reprint as needed.	IP and address	Office, CM, IP name
RCS Tickler Qry: WSPtickler	List of all Ips who have completed Watch, but the RCS has not been returned within 30 days. IIf([RCSSentDate]+30)<=Now(),"y","n")	Office, intake date, referral office, RCS sent date, IP, Clt	Office, IP
Watch/RCS Qry: WatchRCSNull	Watch or RCS has not been returned.	Office, intake date, IP ID, IP, watch sent date, RCS sent date, Clt, CM	Office, IP
Watch/RCS labels	Labels for the Watch/RCS report	IP and address	Office, IP
Case Manager Reports			
CM Monthly Seattle	List of all Ips by casemanager for the Seattle office. The CE date should be an expression: IIf([FCGTaken] Between #1/1/2001# And #12/31/2001#,"N/A",[CETaken01])	IP, office, CM, IP ID, FCG due date, watch sent date, RCS return date, contract end date, FCG taken, CE '01, clt	Office, CM, IP name
Seattle IP labels	Labels for the CM Monthly Seattle report. Mainly used for sending service plans to Ips. Need check list in order to reprint as needed.	IP and address	CM, IP
CM Monthly Kent	List of all Ips by casemanager for the Kent office.	Same as CM Seattle	Office, CM, IP name
Kent IP labels	Labels for the CM Monthly Kent report. Mainly used for sending service plans to Ips. Need check list in order to reprint as needed.	IP and address	CM, IP
Office Reports			
Active Ips	List of all active Ips.	Office, IP, IP ID, initial date of svc, watch sent date, FCG taken, CE '01, contract end, Clt, CM	Office, IP
Active IP Labels	Labels for the Active List .	IP and address.	Office, IP
Inactive Ips	List of all Inactive Ips.	Office, IP, IP #, initial date of svc, contract end, termination date, Clt, CM	Office, IP
Available Ips	List of all Ips who's status is	IP, contract end date,	IP name

Report Name	Description	Fields	Filter
	Inactive-Available.	criminal history result, FCG taken, CE '01, CM, zipcode	
HCS Missing	List of Ips referred from HCS and are missing Watch, RCS, Contract, and FBI reports.	IP, intake date, initial service date, watch sent date, RCS return date, contract end date, FBI return date, FBI sent date, Clt, office	IP name

7.3 Generate program specific reports

7.3.1 Nurse Reports

- Monthly Nurse Detail: A list of clients, activity types and frequency by nurse
- Quarterly Nurse Summary: number of activities, referrals, and type of activities by team.
- Quarterly Nurse Caseload summary: number of activities, referrals, % of caseload, number of core clients, number of new clients reviewed per team by case manager.
- Quarterly utilization: number of each type of activities, referrals by month per case manager.
- Monthly service statistics: by month, number of clients served, unduplicated count, and RN staff hours.

7.4 Generate monthly caseload summary reports (ICL, Supervisor case assignment, caseload report by team and specialty)

8 System Administration

8.1 Maintain user table

Access, security

8.2 Maintain look-up tables

- 8.2.1 Program types
- 8.2.2 Buildings (SHA)
- 8.2.3 Service types
- 8.2.4 Staff
- 8.2.5 Outcomes
- 8.2.6 Language
- 8.2.7 Ethnicity
- 8.2.8 Termination codes
- 8.2.9 Income categories
- 8.2.10 Agencies

8.3 Duplicate screening

8.4 CA ID missing report